

# Implementing a new Carolina Digital Repository: communities, customizations and change

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# Background

Carolina Digital Repository split

- Institutional repository content → Samvera Hyrax
- Digital collections content → custom Fedora



## New Platform Wish List

- Custom branding
- SEO
- Analytics
- Content discovery
- Support existing use cases



# Project scope by the numbers

Works to Migrate: 28,000-ish

Worktypes: 9

Collections: 18

Workflows: 5

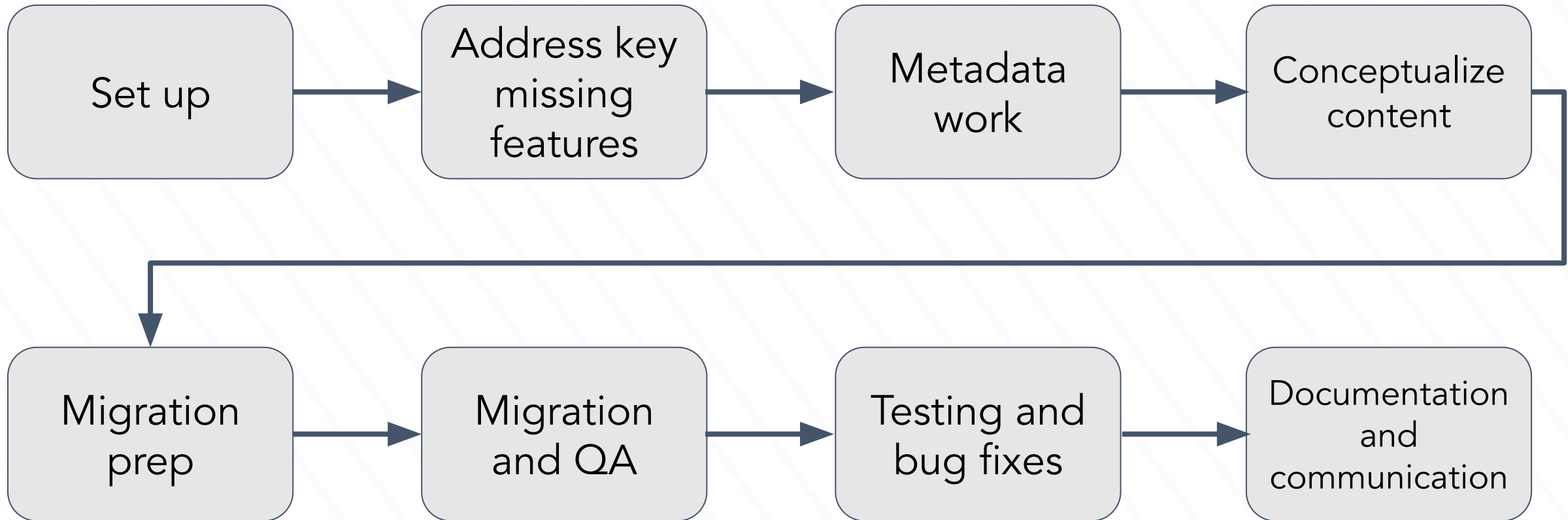
Staff: 16+



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# Extremely simplified migration flow



# Working in the Samvera Community

## WHAT WE OBSERVED...

- The community was expressing a need for more people to participate.
- The platform was being tested, but not in a comprehensive way.
- Release labeling and practices were not following what we expected (major versions released as point versions).

## WHAT WE OBSERVED...

- There was no comprehensive feature guide or documentation for repository managers.
- There was a lot of desire from non-developers to be involved, but not a clear way to help.
- There was a structure in place for the community to self-organize (Interest groups and Working Groups).

# WHAT WE DID (IN THE COMMUNITY)

- Got involved in the Samvera community
- Contributed staff in official roles (Established the first Hyrax QA lead)
- Contributed to community feature documentation
- Help wrangle the repository managers to raise profile
- Contributed code (features and bug fixes)



## WHAT WE DID (LOCALLY)

- We did as few customizations as we could get away with, contributing back where it made sense and was not too hard.
- We moved carefully with upgrading.
- We reported and fixed bugs.
- We supported and encouraged staff involvement in the community.

# Local customizations vs contributions

- Is it specific to UNC?
- Is it very complex?
- Is there an open issue or bug in the hyrax project?

## Local work

- People objects\*
- Variable group permissions assignments\*
- Admin roles and permissions
- Tombstones
- Department browse
- Link from child work to parent

## Community work

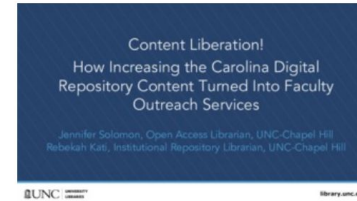
- Analytics work
- Simple UI fixes (moving or adding links, enforcing application template, etc)
- Email text customizations

# People objects

- Group name, ORCID, and affiliation
- Nested objects on main work record in fedora and structured text in solr
- Editable in work form
- Notes:
  - Scripting edits to people objects requires deleting attributes before replacing with new values
  - When removing object, only the associated uri on main record is removed

## Content Liberation! How Increasing the Carolina Digital Repository Content Turned Into Faculty Outreach Services

Public Deposited



[Download PDF](#)

[Citation](#)

### Last Modified

February 22, 2019

### Creator

Kati, Rebekah

- ORCID: <http://orcid.org/0000-0002-3497-8432>
- Affiliation: University of North Carolina at Chapel Hill. Library

Solomon, Jennifer

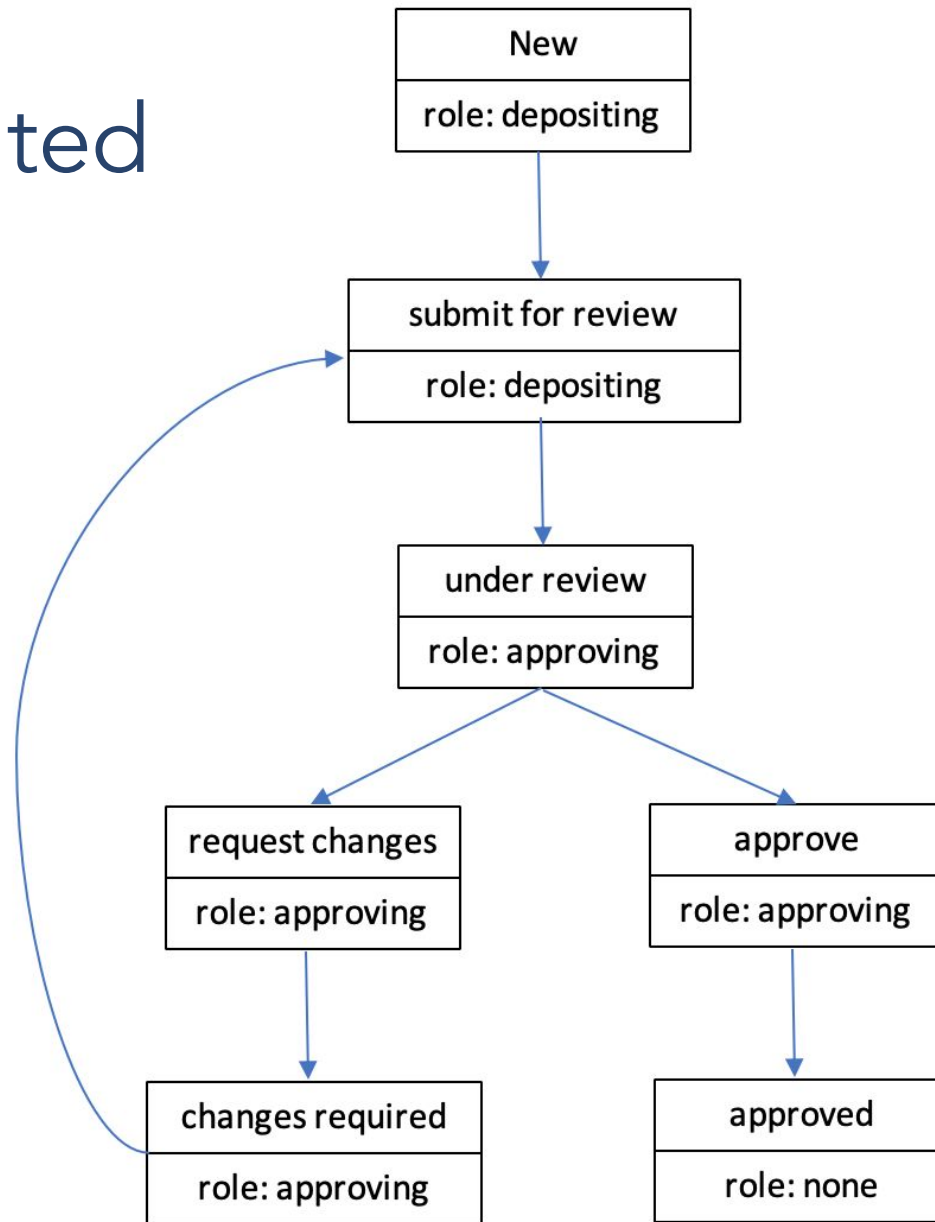
- ORCID: <http://orcid.org/0000-0003-4633-5810>
- Affiliation: University of North Carolina at Chapel Hill. Library

```
<http://cdr.lib.unc.edu/concern/scholarly_works/rr172019d#nested_persong485382620>  
<http://id.loc.gov/vocabulary/identifiers/orcid> "http://orcid.org/0000-0003-4633-5810";  
  <http://schema.org/affiliation> "University of North Carolina at Chapel Hill. Library";  
  <http://www.loc.gov/mods/rdf/v1#name> "Solomon, Jennifer" .
```

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<http://id.loc.gov/vocabulary/identifiers/orcid> "http://orcid.org/0000-0002-3497-8432";  
  <http://schema.org/affiliation> "University of North Carolina at Chapel Hill. Library";  
  <http://www.loc.gov/mods/rdf/v1#name> "Kati, Rebekah" .
```



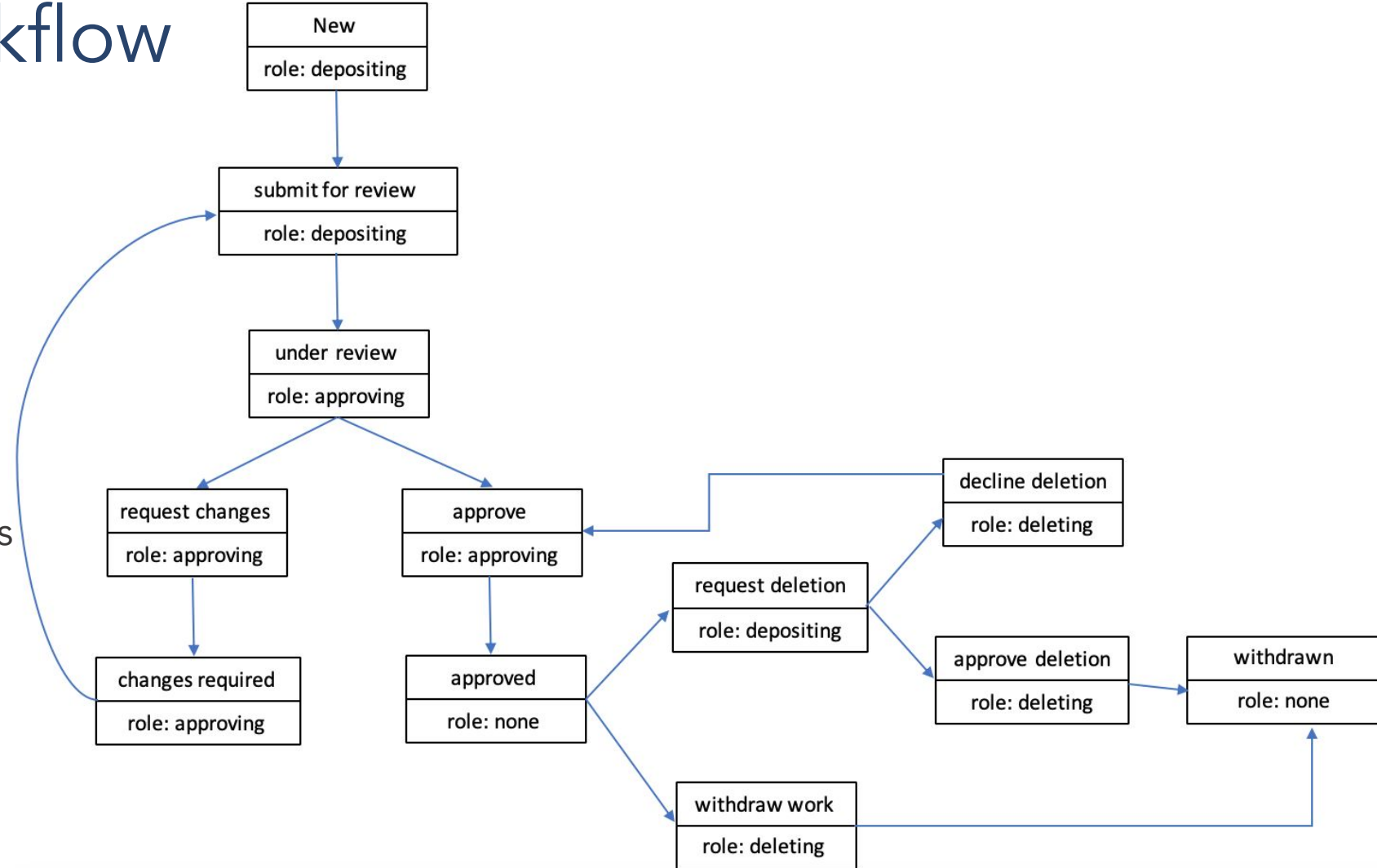
# Default mediated workflow





# UNC honors workflow

- Custom notifications
- Additional steps for withdrawing items
- Custom permissions services
  - Assign group permissions by affiliation on submission



# Lessons learned

- Migrations take longer than you think.
  - Never give a go live date until it's certain.
  - Are cost estimations ever accurate? Or is it scope creep?
  - Celebrate smaller milestones.
- No system is perfect.
  - Flexibility paid off.
  - Solve for the need, instead of replicating exact functionality
- It paid off to work in the community.
  - Learning from the community was great.
  - Good examples of implemented code.

# Questions?

Vist the CDR!

- <https://cdr.lib.unc.edu>
- <https://github.com/UNC-Libraries/hy-c>

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Jennifer: [smithj15@email.unc.edu](mailto:smithj15@email.unc.edu)